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Spinning a sustainable yarn: Environmental sustainability and brand story in the Australian fashion industry

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Abstract

In the Australian fashion industry, few fashion brands have intervened in the design of their products or the systems around their product to tackle environmental pollution and waste. Instead, support of charities (whether social or environmental) has become conflated with sustainability in the eyes of the public. Thus it is difficult to assess with any accuracy fashion brands' response to sustainability. This article aims to address this through proposing a categorization system to structure the various interventions that a company may make. This system is applied to two case studies, analysing campaigns that respond to environmental sustainability by two established Australian brands, Country Road and Billabong. The case studies demonstrate how the interventions employed by a company, at least in the Australian context, are carefully developed to align with their brand story, revealing the interplay between the intangible aspects of a brand's positioning and the tangible, measurable impacts of their garments.

Keywords

fashion

sustainability

waste

corporate social-responsibility

branding

Australian fashion-industry

Billabong

Country Road

Introduction

The fashion industry is in a state of transition towards more environmentally and socially responsible behaviour as it becomes increasingly important for brands to be transparent in their supply chains. Around the world there are an estimated 47 different accreditation schemes for ethical and/or environmental responsibility in the fashion industry (Gertsakis and Neil 2011). However with so many accreditation schemes, and when brands have supply chains spanning the globe, it is very difficult for consumers to assess the value of the schemes and to trust that the brands are being as responsible as they claim. The key question is: how can the many aspects of a fashion brands' Corporate Social Responsibility (CSR) be mapped? Key issues in product development include management of upstream and downstream pollution and waste, treatment of workers, materials and methods of production, and product stewardship (Fiksel 2009). CSR more broadly includes all the societal obligations of a company, and as such includes not only activities to lessen the environmental impacts of products but also a disparate mix of other activities such as philanthropic activity, anti-discrimination measures, and product safety (Sen and Bhattacharya 2001: 226).

Although CSR encompasses a wide range of social and environmental obligations of companies, this article focuses on environmental responsibility in the fashion industry, exploring the intersection of companies' intangible brand with the tangible impacts of their material garments through case studies of two Australian brands. First, the article proposes a grouping system for company interventions for environmental and social sustainability, organized into three levels: interventions in product, interventions in systems around the

product, and interventions in the wider company. Through mapping these levels of intervention, it becomes evident where companies are focusing their energies.

Second, this article proposes that a company's choice of intervention is frequently developed to align with their brand story. To illustrate this, the waste management schemes of two Australian companies are discussed. Billabong and Country Road recently put forward initiatives that explicitly tackle the pre-consumer or post-consumer waste associated with their products. Through analysis of their schemes, this article argues that the initiative chosen by each company feeds into the stories they tell about themselves and about the consumers who purchase their clothing. This article will discuss the challenges of accurately assessing the claims made by companies, suggesting that a more nuanced assessment of green claims is required, in which 'green' comes in many tonal variations.

Background: Fashion and sustainability

The backdrop to this article is one of converging 'wicked' and 'super-wicked problems' - namely climate change, overpopulation, energy, food and water security, and environmental degradation (Levin et al. 2009). These problems demonstrate that the current mode of industrial development is unsustainable in the long term. Sustainable development is widely viewed as 'development that meets the needs of the present without compromising the ability of future generations to meet their own needs' (Brundtland and Khalid 1987). Sustainability, then, refers to the balancing of often competing environmental, economic and social needs, otherwise known as the triple bottom line of 'people, planet and profit' (Elkington 1998). It articulates the need to eradicate poverty, to preserve natural capital and to evolve our economic and cultural frameworks accordingly. Pathways toward a sustainable development range from the weak - the incremental 'greening' of capitalism, through to the more radical -

the fundamental restructuring of economies and societies to operate within planetary limits (Milne, Kearins and Walton 2006).

Within the fashion industry, and in fashion scholarly research, there has been a concerted effort in recent decades to address the environmental and social impacts of fashion production and consumption (see Fletcher 2008, 2011; Black 2008, 2012). The fashion system is a highly globalized, labour and resource intensive sector, characterized by built-in obsolescence in the form of rapidly changing aesthetic tastes and trends, and 'locked into a cycle of unsustainability' (Draper, Murray and Weissbrod 2007: 13). The sector's unsustainability is, to simplify, two-fold. First, there are negative social and environmental impacts from the manufacture and finishing processes of apparel, and second, the constant change in intangible fashion styles escalates consumption and production, exacerbating these impacts (Gertsakis and Neil 2011: 130). Thus the challenge of fashion and sustainability necessarily involves both the production and consumption of fashion.

The analogy of life cycle is one approach to categorizing the environmental and social problems associated with fashion production and consumption (see Fletcher 2011; Payne 2011). Life cycle analysis, while generally quantitatively assessing the environmental impacts of a garment, can also be used as a model to understand the upstream and downstream impacts of fashion products. The fashion garment life cycle is illustrated in Figure 1. The garment life cycle begins with the fibre and textile production processes, many of which have harmful effects on both workers and environments in the form of pollution of waterways by pesticides, dyes and chemicals used in the textile finishing processes (see Friends of Nature et al. 2012). In the design phase, the speed of production and the built-in obsolescence of fashion means garments are designed to be desirable to consumers for only a short time, with garments often discarded while still wearable, resulting in significant waste to landfill. In the manufacturing phase, apparel workers are often the world's most

marginalized and exploited, with fashion production increasingly offshored to developing countries (see Dickson, Eckman and Loker 2009). The distribution phase of the life cycle results in significant greenhouse gas emissions as garments are transported around the world: fibre may be grown in one country, apparel manufactured in another and the final garment retailed in a third (Rivoli 2005). In the retailing and use phase of the garment, there are issues associated with overconsumption, waste and the environmental impact of laundering garments (see Dombek-Keith and Loker 2011). Finally, in the disposal phase, garments are frequently discarded to landfill. As well as representing a waste of the energy and water used to produce them, the discarded garments also pollute soil, air and groundwater (Caulfield 2009).

[Insert file: Payne_fig1_lifecycle.jpg]

Figure 1: Garment life cycle (illustration: Alice Payne).

Evidently the fashion industry's negative social and environmental impacts are connected to both production and consumption. However, fashion's producers, ranging from fibre and textile manufacturers, to brands and designers, can limit the environmental waste and pollution associated with their products through choice of fibre, dyes and developing strategies to reduce waste across the life cycle. In the past twenty years, CSR and the notion of the triple bottom line has become increasingly integrated into the business practices of large apparel companies. Many of the world's biggest apparel companies are slowly adapting to more environmentally responsible practices, with the past decade in particular seeing measurable change from large companies such as Marks and Spencer, Walmart, Hennes and Mauritz (H&M), PUMA and Nike in both reducing environmental waste and pollution and in

seeking to develop ethical supply chains (see DeLong 2009; Fiksel 2009; Siegle 2012). Yet as the discussion of the breadth of social and environmental issues across the garment life cycle demonstrates, the challenge of fashion and sustainability is multifaceted and hard to quantify. Many brands may have achieved success in some areas of the life cycle, but ignored others. Similarly, their interventions may be perceived as tokenistic ‘greenwashing’, or making misleading or false environmental claims (ACCC 2011).

Methodology

In order to explore the intersection between company response to environmental sustainability and brand story, this article first examines and categorizes existing schemes for assessing a company’s response, and then focuses on two Australian companies as exemplars. Analysis of company interventions is conducted using a schema developed as part of the author’s doctoral project on sustainability and the design process in the Australian fashion industry. The schema proposes three categories of intervention for sustainability, and was developed through analysis of fourteen international and eighteen Australian fashion mass-market brands. These companies are listed in Table 1.

Table 1 **Companies assessed in schema development**

Australian brands	Sportsgirl
	Portmans
	Valleygirl
	Forever New
	Supre
	Cotton On

	Kmart
	Target
	Rivers
	Best and Less
	Big W
	Harris Scarfe
	Billabong
	Kathmandu
	Country Road
	Cue / Veronika Maine
	Gorman
Overseas brands	Zara (Spain)
	Topshop (UK)
	Gap (US)
	Hennes and Mauritz (H&M) (Sweden)
	Forever 21(US)
	Walmart (US)
	British Home Stores (UK)
	Marks and Spencer (UK)
	Target (US)
	Nau (US)
	Patagonia (US)
	Nike (US)
	Levi Strauss (US)

	G-Star Raw (US)
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As product design and the role of designer was central to the research, the schema grew from examining how brands intervened in product design to then exploring other CSR activities. Using data gathered through their websites, in store product displays, garment analysis, CSR reports and industry publications, first the market level of the company was positioned according to price point and market presence and then the company’s strategies that consider social or environmental issues were listed and sorted. This data was collected in tables, grouped and cross-referenced across companies and market levels (see Table 2 for a sample table). This sorting process led to the development of the three categories of company intervention: direct intervention in product to reduce environmental or social impacts; intervention in the manufacturing, retailing or consumption systems around the product; and interventions in the wider company that are unconnected to product, but have other social or environmental benefits.

Table 2 **Australian fast fashion retailers’ interventions for sustainability**

Fast fashion retailer	Current interventions for sustainability		
	<i>1. Product</i>	<i>2. Systems around product</i>	<i>3. Wider company</i>
Sportsgirl	Report in 2010 of small range using second-hand fabrics	No CSR policy advertised (none visible for Sussan Group either)	Supports the Butterfly Foundation
Forever New	None visible	No CSR policy / Code of Conduct (COC) advertised	None visible
Cotton On	None visible	COC for manufacturer / CSR policy Eco shopping bags	Cotton On Foundation

Portmans	Commitment to use no sandblasted denim	Australian suppliers on <u>Textile Clothing and Footwear Union of Australia</u> TCFUA) agreement Overseas suppliers comply sourcing code of conduct, based on the Ethical Trading Initiative Base Code Use of oxo-biodegradable shopping bags	Just Group signed 5-year action plan for Australian Packaging Convention regarding packaging: includes targets for product stewardship of all packaging e.g. hangers, boxes, bags, etc. Supports charities Red Cross, Salvation Army, The Smith Family, RSPCA, among others.
Supre	None visible	No CSR policy / COC advertised Eco shopping bags	None visible

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Bardot	None visible	Accredited with Ethical Clothing Australia for locally-made product No CSR policy / COC advertised	None visible
Valleygirl	None visible	No CSR policy / COC advertised	None visible

The two mass-market companies chosen as case studies, Billabong and Country Road, were selected for their advertised schemes for environmental sustainability and for their brand recognition within the Australian fashion industry. In regard to environmental sustainability, few Australian companies have intervened in product, as the example of fast fashion brands in Table 2 demonstrates. Billabong and Country Road were selected as case studies because each ~~had~~ has an environmental campaign that specifically targets the environmental impact of their products, albeit with different approaches. Case study research converges multiple sources of evidence to build a holistic picture of one unit of analysis ('the case') (Yin 2009: 18). Building these two company case studies required multiple data sources, drawing on in-store observations, company marketing material, CSR statements and reports, industry reports and articles, and scholarly literature. Specifically, observations were conducted during 2012 and 2013 via five to six store visits at three Billabong stores, two Country Road stores and one concession, all in Queensland, Australia. In addition to handling and observing product, its price, construction, materials and branding, I spoke with retail staff and observed

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customers in store and visual merchandizing approaches. Alongside this primary research, I explored the history of each brand and their online presence through newspaper and online articles and social media. The data were used to understand the ‘story’ each brand has developed through the combination of marketing materials, design aesthetic, Australian heritage and market level (indicated through price and store positioning). This in turn enabled an analysis whereby each brand’s approach to environmental sustainability could be compared and contrasted with their brand story.

Assessing a company’s approach to environmental sustainability

Assessments of a company’s claims may be quantitative or qualitative. Two different approaches for assessing a company’s eco-credentials reveal the complexity of the process, as both immaterial branding and material impact need to be assessed. A qualitative approach is undertaken by Lise Skov and Janne Meier (2011) in their observations and interviews at Copenhagen Fashion Festival. They describe three types of brand engagement with sustainability: light green, hardcore green and green luxury (see Figure 2). This notion of ‘shades of green’ has been used in other analyses to demonstrate differing degrees of engagement with environmental issues (Gray 1992; Jamison 2002). In Skov and Meier’s model, ‘light green’ brands do not have environmental sustainability as intrinsic to the brand story, but do offer a small range within the larger collection which is ‘green’. In contrast, ‘hardcore green’ brands have green ideals embedded in the brand story – an example being Patagonia, which was founded by environmentalist Yvon Chouinard. Green luxury refers to brands that focus less on fashion trends and more on high quality through artisanal manufacturing methods and natural materials, examples include niche designer labels such as Johanna Riplinger and Cocccon. The majority of major apparel brands fall into the light

green category, including brands such as Zara, Gap and Marks and Spencer who each offer eco-friendly or organic cotton ranges alongside their main collections.

[Insert file: Payne_fig2_greenbrand.jpg]

Figure 2: Skov and Meier's (2011) three types of brand engagement (illustration: Alice Payne).

Another approach to assess company interventions is via quantitative methods. Websites such as Rank a Brand, Green Conduct and Interbrand pressure brands to be accountable for their social and environmental claims. Rank a Brand is a European consumer initiative run partly by volunteers who research brands via their websites and assign ratings based on companies' claims (Rank a Brand 2013). It rates brands through assessing company reports on questions of climate change policy, environmental policy and labour conditions. This approach pays less attention to the brand story of a company and instead gives each company a rating based on an aggregate of their performance in these three key areas. Rank a Brand is a consumer-centred approach, with the aim being for greater transparency so that consumers can hold brands accountable and also make their purchasing choices based on the ratings.

The qualitative approach of Skov and Meier aids in identifying how a brand wishes to appear: whether sustainability is a core brand value, or a light green extra. The quantitative approach of Rank a Brand ignores brand values and instead assigns points for concrete actions.

Intriguingly, these two approaches can lead to different conclusions, as a comparison of Patagonia and H&M's Rank a Brand scores reveals. As journalist Lucy Siegle (2012) notes, H&M is a global leader in reducing waste and chemical impacts of their garments, yet paradoxically their fast fashion production model is in antithesis to sustainable consumption.

This paradox is also revealed in Rank a Brand's (2012a) rating for H&M. While H&M would be classed as a light green company in which sustainability is not inherent to the brand story, Rank a Brand scores higher than Patagonia with ten out of sixteen (Rank a Brand 2012a). Patagonia, a hardcore green company in terms of brand story, scores nine out of sixteen (Rank a Brand 2012b). Clearly, the challenge is to determine an appropriate methodology for assessing a company's claims.

This challenge is compounded by the lack of binding international agreements on pollution, waste and chemical use in the global textile and apparel industries: each region or country may have a different regulatory environment. To give one example, the problem of hazardous chemicals in clothing is significant across the garment life cycle. Earlier in the life cycle, these chemicals pollute waterways and soil, and in both manufacturing and use phases of the life cycle they pose grave health risks to workers and consumers alike. In the United States and the European Union there are a number of initiatives in place for some years to regulate chemicals in textiles. Examples include the EU REACH guidelines that regulate 300,000 chemicals (Browne 2012), the Global Organic Textile Standard (GOTS), the Oeko-Tex index and ISO certification systems (Gertsakis and Neil 2011). Yet in Australia the regulatory environment is far more lax. According to the Australian industry analyst Paula Rogers (2011), Australia's imported textiles are among the most unregulated for chemicals in the developed world, often containing levels of formaldehyde that would be unacceptable in European countries. More widely, environmental externalities (for example, textile dyes polluting Chinese river systems) are not quantified as part of a company's CSR reporting. The complexity of fashion's global supply chains means that the polluting aspects of fibre, textile and garment production has been largely offshored to developing nations that may not have the stricter regulatory manufacturing environment of developed nations.

Categorizing Australian companies' interventions

In contrast to Skov and Meier's (2011) findings in the European marketplace, a large number of Australian companies could not even be termed 'soft green', as many display no measurable interventions for sustainability. Australian Textiles Clothing and Footwear (TCF) industry researcher Walsh claims that Australian retailers are still firmly in the realm of 'greenwash' (2009: 28). The reason for this may be connected to the dominance of Australian-owned companies in the market, and the lack of competition from large overseas retailers, who may have brought the macro trend of sustainability to the public's attention sooner.

In order to sort through the mixture of brand messages and greenwashing, this section groups company initiatives into three main types of intervention: intervention in product design, in systems around the product or in the wider company operations. These categories are illustrated in Figure 3. In terms of environmental sustainability, the key point of intervention is in the product and in minimizing its environmental impacts. The extent to which companies intervene in the design of their products to reduce waste and chemical pollution will determine the genuineness of their responses to environmental sustainability.

[Insert file: Payne_fig3_categories.jpg]

Figure 3: Categories for company intervention for sustainability (illustration: Alice Payne).

Category 1: Intervention in product design

Category 1 concerns intervention in product design, which may involve an assessment (whether qualitative or quantitative) of the garment life cycle that examines the impacts of the product at input (fibre and textiles) through to outputs (end-of-life disposal and recycling

options) (Vezzoli and Manzini 2008). This category may also include innovations such as products that are able to be disassembled and close-loop recycled at end of life. For example, see Patagonia in Loker (2008). Over twenty years ago, the Californian-based mass-market brand Esprit implemented an eco-collection that sought to minimize the impacts of their garments through addressing all aspects of the cradle-to-gate cycle (i.e. ending at retail) (Furst 2012). Similarly, since its conception, the outdoor-wear label Patagonia has implemented the use of recycled polyester in fleece jackets, and conducted life cycle assessments on their garments (Brown and Wilmanns 1997; Hopkins, Allen and Brown 1994). Other prominent companies intervening in product design include Nike (DeLong 2009), PUMA (2012) and Marks and Spencer (Draper, Murray and Weissbrod 2007). Fast fashion companies such as Hennes and Mauritz (H&M) and Topshop have also explored design strategies such as upcycling and using lower-impact fibres (Siegle 2012).

In the Australian mass-market, intervention in product has mostly appeared in the choice of ecologically considered fabrics: organic cotton (e.g. Target, Country Road), Lyocell (e.g. Cue, Witchery) or recycled yarns (e.g. Billabong). These interventions in product design are aligned with eco-design strategies, namely reducing water usage, selecting more ecologically-sound fibres and textiles. The companies that have visibly intervened in product design typically do so more often in staple, basic lines and less often in their fashion-forward collections. For example, the underwear company Mitch Dowd utilizes soy, bamboo and organic cotton in their Oeko-Tex and GOTS-certified 'Green by Mitch Dowd' range (Anon. 2007), while the underwear and hosiery company Ambra has an 'EcoStyle' range utilizing bamboo, organic cotton and natural dyes (Anon. 2008). Similarly, Target's organic cotton, organic merino wool and bamboo ranges comprise either underwear, or basic T-shirts and leggings. This is also the case with Driz-a-bone's 'Activ' range of base layers in organic, biodegradable merino wool (Smart 2008). These examples would fall into the 'soft green'

Comment [AP3]: This is correct spelling – I have adjusted ref list accordingly

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brand category identified by Skov and Meier (2011). In all these cases, these fibres are used for the aesthetically stable product lines, and only for a portion of the overall range. One small exception to this is a fashion range by Sportsgirl. Industry magazine *Ragtrader* reported in 2010 that Sportsgirl presented a niche vintage collection made from recycled materials, indicating that there is some potential for the mass-market to explore upcycling within the fashion design process (Bryant, Kellock and Zimmerman 2010).

It is important to note that intervention in product is often related primarily to managing the environmental impacts of the garment, rather than to the ethical issues of the treatment of workers. However, changes in product design can have a positive impact on worker health, with an example being the elimination of sandblasting finishes on denim (O'Loughlin 2010). Similarly, selection of responsibly produced cotton ensures a healthier working environment for cotton workers, reducing the grave risk of worker poisoning from pesticide use in the industry (Mancini et al. 2005). Related interventions in product design would include eliminating toxic dyes that have deleterious impacts on worker health, consumer health and the environment. Thus, although the chief focus of this article is on fashion and environmental sustainability, social and environmental sustainability issues are frequently interrelated and both may be considered within product design.

Category 2: Intervention in systems around the product

The second category of interventions explores the systems around the product. This category involves intervening in the consumption and use systems around the product – namely, how the impact in the use phase of the garment can be minimized, whether the garment can be manufactured locally or more efficiently and how users can be encouraged to dispose of the garment responsibly. Crucially, this will not involve changes in product design per se. Examples include developing supplier codes of conduct to ensure the ethical treatment of

workers (e.g. Cue and Bardot accredited by Ethical Clothing Australia). Although many mass-market Australian labels publish their Codes of Conduct on the website, many others do not. Other examples of interventions in the systems around the product include the use of biodegradable or reusable shopping bags and packaging to reduce waste. Another example is the use of in-store signage in Australian department store Target to encourage consumers to launder their garments at lower temperatures. While not interventions in the actual products offered, these system interventions serve a valuable purpose in considering how the garments are retailed, laundered and disposed of.

Category 3: Intervention in the wider company

The third approach is unconnected to product, and instead looks at the wider systems of company management and community engagement. This is a broad category, and includes varied initiatives from installing eco-efficient lighting in retail stores and internal recycling of office paper and packaging, to commitments to reduce greenhouse gas emissions. It may also involve partnering with or donating to charities and NGOs. The Australian fashion industry has responded to sustainability by mainly adopting practices that pertain to the third category. This typically includes recycling office paper (Target, Country Road) or partnering with charities (see Sportsgirl, Jay Jays, Witchery). Again, like Category 2 interventions, these interventions do not address the material impacts of the actual products, but rather aim to improve the company's overall performance on a range of CSR issues. While some initiatives in this third category can be dismissed as greenwash or as tokenistic, they are arguably important first steps within the culture of a company.

The Australian fashion group Sussan has toyed with a number of initiatives across all three categories of intervention. The Sussan Group is one of the biggest retailers of womens' clothing in Australia, and includes Sportsgirl, Sussan and Suzanne Grae. Liliana Pomazan

(2010: 238) reports that Sussan Group had been preparing for the possible introduction of an Emissions Trading Scheme since 2007, with the aim to be carbon neutral by 2012 through reduced emissions and the use of renewable energy and recycled materials. While this may have been on the agenda in 2007, there is no update from Sussan Group as to whether the target was achieved. There have also been some interventions at a product level. Crucially, the work being done overseas by large mass-market companies such as H&M and Nike is likely to become the industry benchmark against which Australian companies will in future measure their own performance.

There are several key initiatives occurring overseas that all intervene for sustainability at a product level as well as a company- and supply-chain level. These include the Outdoor Industry Association's Eco Index, Nike's Environmental Apparel Design Tool and Nike's Materials Sustainability Index. A fourth, which in part grew from the first two initiatives, is the Sustainable Apparel Coalition (SAC). This has 40 members comprising some of the world's largest apparel companies and suppliers, including Adidas, PUMA, Nike, Marks and Spencer, Walmart, Gap, H&M, Patagonia and Li and Fung. The purpose of the Coalition is to explore product and process innovation in order to create 'credible, practical, and universal standards and tools for defining and measuring environmental and social performance'. The Coalition aims to 'lead the industry toward a shared vision of sustainability built upon a common approach for measuring and evaluating apparel and footwear product sustainability performance' (SAC 2012). Currently, this is a business-to-business (B2B) approach on the part of companies, as opposed to a consumer-side organization, and as such represents a concerted attempt at developing global best practice for apparel companies. As a B2B consortium, it is less about a company's branding – creating initiatives to 'look good' – and more a pragmatic approach to tackling fashion's endemic problems of pollution and waste at an operational level.

Comment [ER5]: mention Patagonia in this list as in endnote 2? See comment below.

Although still nascent, it is likely that overseas initiatives will become the baseline for sustainable business practices, as within a broader economic and social context, it will not be viable for publicly listed companies to ignore these strategies. The movement for sustainable fashion within a mass-market level has grown from the outdoor/sportswear apparel side of the market – generally the slower moving, less fashion-forward collections such as those of outdoor brands Patagonia, Mammut or Nau. While these garments are a high pricepoint, the garments are still mass-produced. Innovations from these brands have examined the design of the individual garment as well as the larger supply-chain dynamics. In contrast, innovations for sustainability in fashion-forward apparel are happening at the niche and luxury end of the market (diverse examples include Junky Styling, From Somewhere, Bruno Pieter's Honest By, or in Australia, MATERIALBYPRODUCT). In both kinds of companies, the need to stay close to shifting fashion trends is less important. On the one hand, the outdoor companies are lifestyle brands, not fashion brands. This means that they must cater to their market: people interested in an outdoors lifestyle, who may also be more environmentally-conscious as a result. This branding then becomes a crucial component of Patagonia or Mammut's strategy, rather than following fashion trends. While on the other hand, the niche labels are arguably fashion leaders, rather than followers. This suggests that design intervention in mass-produced product is more easily achieved in a less fashion-influenced company, or conversely, design intervention can be achieved in niche/handmade product from a company that distinguishes itself through its own distinctive aesthetic that is less connected to current fashion trends.

The interventions described above can potentially reduce negative social and environmental impacts of the company. In large companies, interventions in each of these categories are more likely to come about through management decisions, rather than the actions of individuals. In the Australian mass-market, investigations into sustainable practices

typically have a company-wide focus rather than a product-level focus. Within the Australian fashion industry, the response to sustainability has been largely in the third category. This typically includes shifting to shopping bags which are biodegradable or reusable (e.g. Cotton On, Target), or recycling office paper (Target, Country Road). Many companies have no visible policy regarding environmental sustainability, but will instead support charities to demonstrate their commitment to social or environmental issues. In fact, researcher Sylvia Walsh (2009) has observed that when compared to overseas initiatives, the Australian fashion industry is still in the realm of 'greenwash'. Greenwash, or the making of false or misleading environmental claims is prohibited under Australian Consumer Law (ACCC 2011), yet while a company's claims may be truthful, their actual interventions may be tokenistic, developed to market an appearance of action. The challenge, then, is to discern the difference between measurable impacts, tokenistic responses and the spectrum of action in between.

Brand stories and environmentalism

The importance of branding and brand story within the fashion system further complicates the approach that a company will take to sustainability. A 'fashion brand' can be viewed as any apparel company that seeks to differentiate its product-offering from those offering similar goods and 'are further intended as a means of expressions of personal preferences, tastes, or acknowledgement of prevailing style trends' (Kendall 2009: 10). As Dominic Power and Atle Hauge (2008: 124) define it, 'branding is an attempt to strategically "personify" products, to give them a history and a personality'. The 'brand story' is an unfolding narrative which a company tells about itself, supported by its marketing, its retail and the aesthetics and materiality of its garments (Hancock 2009; Fog et al. 2010). The brand story holds implicitly all information about why the brand differs from its competitors – this may include its particular customer (and their socio-economic status), its design differences,

narratives about its origins, its associations with subcultural groups, and by extension, the way it will respond to trends. In fashion, the differences between different apparel companies are largely aesthetic – their materiality and construction is rarely so unique as to be the chief selling point. As Richard Sennett (2006: 144) observes, ‘To sell a basically standardized thing, the seller will magnify the value of minor differences quickly and easily engineered, so that the surface is what counts. The brand must seem to the consumer more than the thing itself.

While to a degree the brand develops its story through an accruelement of both history and chance, the brand story of a company is often purposefully and strategically developed by the company manager, owner or creative director. In this way a company describes the type of shopper to whom they are catering, as well as the intangible signals of identity that their customer will aspire to. As the apparel marketplace has shifted to targeting smaller niche groups of consumers (McKelvey and Munslow 2008), the brand story is essential in pinpointing the company’s audience.

The most successful brand stories are associated with market leaders such as Nike and Ralph Lauren, who have encased themselves in a kind of mythology, in which the quality of the product may be of lesser value than the branding attached to it (see Agins 1999, 2000; Hancock 2009). However ‘brand story’ need not only refer to the narratives of iconic global brands. The two Australian companies discussed in the following case studies, Billabong and Country Road, although operating at a far more modest scale than Nike and Ralph Lauren, have a particular brand story, designed by company management, though also being continually tested and re-examined as their market and its tastes shift.

Increasingly tied in with the brand story is the desire to humanize the brand, to demonstrate that the brand serves a social good – fashion marketer Bill Webb (2007: 84) refers to this as ‘differentiation by standing for something’, which may involve support for

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charities as well as varied environmental claims. Fashion companies are operating in an increasingly ‘moralized brandscape’, where any unethical behaviour will rapidly be noticed by savvy and connected consumers (Salzer-Mörling and Strannegård 2007). It is becoming crucial for a company to demonstrate their social and environmental responsibility, as customers are quick to respond on social media at perceived discrepancies between brand story and brand actions.

Globally speaking, some of the highest-profile mass-market apparel companies, such as Nike, Walmart and Marks and Spencer, are vocal in their support of sustainable fashion, albeit to varying degrees. The reasons for this are best expressed in the case of Nike, who in the 1990s suffered brand damage through their connection to sweatshops and child labour. Since this consumer outcry, Nike has transformed itself into a world leader in social and environmental responsibility with clear evidence of a life cycle perspective embedded in both sourcing and product development (DeLong 2009). Nike (2010) developed the ‘Considered Index’ tool for their designers to quantitatively assess the environmental sustainability of the design throughout its design process, enabling designers to reduce the ecological footprint of the garment through textile and trims choices. This tool led to the development of the Higg Index, used by the SAC. Trust in a brand is crucial, and thus there is an increased push towards transparency on the part of companies. For example, both H&M and Nike publish the full names and addresses of all their suppliers on their websites, and PUMA has released detailed Environmental Profit and Loss (EP&L) reports on their activities (PUMA 2012).

In contrast to the activities of the world’s largest apparel companies, no Australian companies have signed up to the SAC, and many do not even have CSR statements on their websites (e.g. discount retailer Rivers and fast fashion retailer Supre). The following two sections explore two Australian brands that have intervened in Category 1: product design or

Comment [ER7]: not cited? Or should this read: In 2010, Nike developed...

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in Category 2: systems around the product for environmental sustainability. In both cases, the intervention they have developed is strategically well-aligned with their brand story.

Case Study 1: Billabong and the plastic soup

Since 2007, Billabong has marketed a collection of boardshorts made from recycled bottles that are also recyclable at end of life. The initiative has been promoted in partnership with Bob Marley's son Rohan Marley, and the graphics of the boardshorts reference the Rastafarian colours and make use of Marley's song lyrics. In this way, the company has tapped into an aspect of surf culture linked to environmental activism, in which the natural world is venerated. This is a strategy for sustainability that at once fits the company's brand story, but also is a genuine intervention in product design.

Billabong is one of the largest surfwear companies in the world, operating in over 100 countries. As well as operating the main brand of Billabong, the publicly-listed Billabong Group owns eight other apparel brands as well as a number of related retail chains within the surf/snow/street sector. Despite struggles in recent years, the Billabong Group had global sales of \$1.68 billion in the 2010/11 financial year (Anon. 2011). Billabong was founded in Queensland in 1973 by surfers Gordan and Rena Merchant, and began with hand-crocheted bikinis, and boardshorts cut out on the dining room table (Baker 2001). These lo-fi beginnings and intimate connection to Australian surfing history are intrinsic to the authenticity of the brand story.

Billabong's intervention is in the first category of intervention: product design, through using organic and recycled fabrics in an undisclosed proportion of their clothing and wetsuits. Their 'eco-suede' is 100 per cent polyester fabric made from recycled plastic bottles, suitable for boardshorts. Eco-suede was developed in partnership with suppliers, and first released onto the market in 2007 (Billabong 2012). The 'Billabong Recycler' collection

is only available in the Billabong menswear range. A number of companies have utilized related technology to develop textiles made from plastic bottles. Examples include Patagonia, Nike and Ford cars. Polyester is a petrochemical by-product, i.e. a non-renewable resource, and its production is highly energy intensive. Use of recycled bottles as feedstock for polyester fibre avoids the use of virgin non-renewable resources.

Billabong's 2011 eco-suede campaign revolved around Rohan Marley, the son of musician Bob Marley. Aesthetically, it fused surf culture with the classic Rastafarian colours of green, gold and red. Iconic images of Bob Marley were adapted into prints, along with quotes from his song lyrics. The message of environmental conservation was expressed in in-store and website displays that featured the Rastafarian aesthetic (Billabong 2011) as well as gave details as to how the Recycler range had been developed (see Figure 4). Although environmental messages and slogans are consistently popular in fashion apparel, Billabong cannot be accused of greenwashing as they have made a measurable intervention in their products.

[Insert file: Payne_fig4_Billabong.jpg]

Figure 4: Billabong's in-store display describing the recycler series (photograph: Alice Payne).

Fittingly, Billabong's 'sustainable' yarn is literally spun from polymerized, discarded plastic bottles. This is a physical intervention in product that has a profound connection to the Billabong brand story. Surfers, as a community, can visibly see the effects of environmental degradation in warming ocean temperatures and in water pollution. The world's oceans are experiencing a crisis of plastic – the Great Pacific Garbage Patch is held in place by ocean

currents and spans thousands of kilometres. The plastic does not biodegrade, but rather photodegrades, breaking down into smaller and smaller pieces, creating a 'soup' of plastic which threatens marine life (Marks and Howden 2008).

Over the five years of the eco-suede initiative, Billabong reports that an 'estimated 40 million plastic bottles had been diverted away from landfill and into the project' (Billabong 2012). This is a considerable figure, however as comparison, in five years the United States disposed of over 900 billion bottles (View: Hidden Truths 2008).¹ The crisis of plastic will, clearly, not be mitigated even partially by initiatives such as this. Despite this, the programme still involves a material, measurable intervention in the physical garment. Without this authentic intervention at a product level, the decision to use environmental messages and Rastafarian colours in the aesthetics of the boardshorts could be dismissed as greenwashing. Under a framework of incremental steps towards sustainability, Billabong's initiative is important both for the symbolism of its action – the poignancy of the plastic soup for surfers – and also for diverting plastic from landfill, reducing the demand to produce virgin polyester.

Case Study 2: Country Road and the good citizen

In an intervention in systems around the product, Australian mid-market retailer Country Road has developed an initiative with a social outcome that arguably aligns to the values of their middle-class consumer base. Country Road has partnered with the Australian Red Cross to implement a recycling scheme in which consumers donate their old Country Road garments in exchange for a Country Road gift voucher. This strategy, while tackling end-of-life waste, tells an altruistic story in which the disadvantaged can benefit from the consumption habits of the middle class.

Country Road explores a different approach to environmental sustainability, though like Billabong, it is an approach that marries well with its brand story. Like Billabong,

Country Road is a respected Australian brand, and was also established in the 1970s, although it is confined to the Australasian region. In 2010, Country Road partnered with the Australian Red Cross charity in the Fashion Trade scheme. Customers donate a bag of used clothing to a Red Cross store, containing at least one Country Road branded garment, and they then receive a \$10 voucher to be spent on their next purchase of 50 dollars or more at Country Road. This strategy is very similar to UK retailer Marks and Spencer's 'schwopping' scheme, in which Marks and Spencer partners with Oxfam to reward customers for donating their used clothing (Marks and Spencer 2012).

[Insert file: Payne_fig5_countryroad.jpg]

Figure 5: Country Road's in-store signage (photograph: Alice Payne).

The brand, as a mid-market label, has an average pricepoint of over AUD \$100, and as such is targeted at upper-middle-class families. The Red Cross initiative is pitched primarily as a charitable concern, with the aim being 'to encourage good quality clothing donations, divert textile waste from landfill and raise revenue for the Red Cross' (Country Road 2012). In-store signage at Point of Sale (POS) tells customers 'Country Road and Red Cross have joined forces to reward you for your social conscience' (Figure 5). The project is framed as a social good – the clothes that the wealthier customer can afford can be given to the less fortunate to enjoy. The customer is rewarded with a gift card to purchase even more clothing from Country Road, and the cycle begins again.

Country Road's initiative is in the second category of interventions for environmental sustainability – intervening in the systems of use and consumption around the garment. This initiative tackles the end-of-life stage of the garment life cycle, when garments are sent to

landfill. Garment disposal to landfill creates a toxic leachate when the groundwater becomes infected with the chemicals in textile waste (Caulfield 2009). As well as diverting textiles from landfill, the Country Road partnership ensures a flow of good-quality garments for resale for the Red Cross. In Australia, charities are swamped by high volumes of donated goods, more than can be processed. A single sorting centre in New South Wales alone processes 10,000 tonnes of donated clothing per year (Gwilt and Rissanen 2011: 157). Poor-quality clothing cannot be resold, and may not be worth the trouble of sorting. As Country Road has a brand cache of good quality, the pieces are more likely to survive the sorting process and hold resale value for Red Cross. The majority of textile waste in Australia currently goes to landfill where these harmful chemicals can then leach into the environment (Caulfield 2009). This issue of textile waste to landfill has been compounded by the shift to offshore manufacturing: some TCF companies may order more stock than required from their Chinese manufacturers in order to obtain a lower price, and then send the remainder to landfill. In the Choice report on chemicals in clothing (Browne 2012), Andrew Mills, the director of textile suppliers Charles Parsons, commented, 'We regularly see examples where local traders buy 500 T-shirts in China [sell 350 shirts] and dump the remaining 150 pieces, simply because it's cheaper.' This highlights the systemic problem within Australia of textile waste and a poorly-regulated TCF sector.

This strategy is also aligned with Patagonia's partnership with eBay, in which second-hand Patagonia clothing can be posted for sale on eBay Green, with the tagline 'because the greenest product is the one that already exists' (eBay 2012). In this way, while not intervening in the product design, Country Road's clothing is arguably already 'greener' through being of (at least perceived) higher quality in make and fibre, and, just as importantly, having a brand story of Australian quality that will ensure the garment can go on to have a second and third life cycle with new users. This is demonstrated on Australian

eBay, with Country Road garments ten times more likely to be offered for sale compared to discount brand Rivers (eBay 2011a, 2011b). The perception of quality does not necessarily hold up under examination of actual garments – a comparison between a basic Country Road T-shirt and a Rivers T-shirt reveals both are manufactured in China to similar quality (e.g. in seam finishing and cut), and both utilize cotton jersey of the same weight. Crucially, this suggests that the intangible branding of the company alone can serve to lengthen the life of the garment.

The scheme has had a small impact in wider waste management terms. Red Cross and Country Road reported that in the first year, across the Australasian market, ‘4,700 garments were donated amounting to a potential Red Cross re-sale value of \$23,000’ (Country Road 2012). This is a modest figure in light of the enormous flows of clothing moving through the Australian market – over 1 billion items of clothing yearly (Wells 2011). However, as important as the actual number is the tacit implication of product stewardship: that Country Road’s garments do have an environmental impact at end-of-life and that the company may need to consider this in some way, even if the scheme defers final responsibility to the consumer.

In terms of branding, the initiative also demonstrates that mid-market brands are well placed to leverage their reputation (whether real or perceived) for having higher quality garments that then have a higher resale value in the second-hand market. Implicit in the scheme is the notion that Country Road’s middle-class customers ‘deserve’ to be rewarded for responsible disposal of the product, and for their charitable concern. Problematically, the scheme suggests customers ‘deserve’ to reward themselves through purchasing more clothing, an act that ignores the first principle of ‘reduce’ in ‘reduce, reuse and recycle’.

Discussion

The strength of both programmes lies in the fact that each programme tackles a specific area of the garment life cycle – Billabong intervenes at the fibre stage, while Country Road looks at the end-of-life stage. Billabong’s initiative makes a measurable intervention in product design, while Country Road’s programme is an intervention in the systems around use and consumption of clothing. The real numbers, however, reveal a modest difference in actual material terms. Whether or not the projects then count as greenwashing or tokenism depends on one’s definition of sustainability: under weak sustainability, these are important first steps. Under a strong view of sustainability, they are ‘feel-good’ gestures and can never masquerade as a solution. Yet it is far harder to make sense of these interventions in the wider context of overconsumption and systemic waste in the fashion industry. The ‘feel-good’ factor simplifies what is necessarily a very complex assessment. Worryingly, the underlying ethos positions consumption as an appropriate action for environmental sustainability, ignoring that the common advice of ‘reduce, reuse and recycle’ begins with ‘reduce’ and ‘reuse’.

More widely, the environmental sustainability of apparel will depend on future legislation. Currently, there is no fee or charge for degrading natural capital, and hence the real environmental cost of a company’s impacts cannot be assessed with any certainty. In 2011 the apparel company PUMA’s EP&L report found the ecological cost of PUMA’s operations in 2010 to be 94 million euros (PUMA 2012). Similarly, a KPMG report (2012) found that if companies paid for the environmental cost of their production, it would cost them 41 cents for every one dollar earned on average.

As environmental externalities are not monetized, environmental sustainability schemes may not be cost-effective for the company, and hence their economic worth is in the ineffable brand value they bring. Billabong’s initiative for the eco-suede accounts to a significant investment in R&D (research and development), and indeed the cost of the

Comment [ER9]: Please spell out abbreviation in parenthesis

Comment [AP10]: KPMG is the full title of the firm.

recycled fabric is likely higher than virgin polyester. Problematically, when customers become cynical or confused about the actual impact of the schemes in real terms, this can then reflect poorly on the brand, negating the worth of the scheme in both material and immaterial terms. An example of this is Skechers, who in 2010 released ‘Bobs’, a collection of shoes utilizing recycled materials. Although a genuine intervention in product, their marketing and branding strategy so closely mimicked that of ethical brand Toms that Skechers were subjected to ridicule and the initiative dismissed by consumers as a cynical marketing ploy (Mainwaring 2010).

However PUMA’s report, and others like it, suggest that the global apparel industry is in a state of transition, from the current time where brand stories influence environmental decisions, to a period when environmental reporting will become standard, and to operate in the market, intervention in product, carbon emission reductions and an EP&L statement will be the minimum requirements (Darlington 2012). Although the movement towards this is slow, there have been significant advances, with consortiums such as the SAC working to embed environmental sustainability within company operations.² Significantly, the SAC is a B2B arrangement, rather than being targeted towards consumers.

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Conclusion

While it is tempting to argue that all efforts for environmental sustainability, no matter how tokenistic, are worthy, attempting to quantify the actions in real terms is highly problematic. It may be difficult to determine the worth of a company’s CSR strategies as they can frequently appear tokenistic, or as greenwash. This article has presented a schema for categorizing company interventions for sustainability based on how connected these interventions are to the actual product. In environmental terms, intervening in product design is the clearest way to demonstrate real, measurable reductions in a company’s environmental

impact. Through sorting company interventions by product, systems around the product and interventions in the wider company, it becomes easier to map and compare company responses. This schema, while developed to map the Australian fashion industry, has potential to be applied in analyses of other fashion companies. When a company's strategy for tackling environmental issues is centred on the tangible impacts of the product, the strategy is less easy to dismiss as greenwashing. As discussed in the two case studies, the charge of 'greenwash' cannot be applied in either the case of Billabong and Country Road, as they are not making false or misleading environmental claims. Although the companies have cleverly chosen schemes that fit their brand story and that will speak to their target customer, they are also intervening in real terms, not only in ineffable branding. In Billabong's case particularly, their scheme represents a considerable investment in R&D and in product design. Both companies have been transparent about the numbers involved for each scheme. Unfortunately, the numbers serve to highlight the inadequacies of these schemes in the wider view of global overconsumption and overpopulation. Only when environmental externalities are given a true monetary cost will companies be forced to intervene more radically in their processes. Until then, there will be myriad shades of green.

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Notes

¹ Two million bottles are disposed of in the United States every five minutes.

² ~~Members of the Sustainable Apparel Coalition include Nike, Li and Fung, Patagonia, Puma, H&M, Walmart, and others (SAC 2012).~~